

Orientee intake form

Complete before or at the start of Day 1. Review with your orientee together.

Orientee name

Unit / specialty

Orientation start date

Expected end date

Previous clinical experience

Nursing school specialty rotations

NCLEX date

Any noted concerns from manager

Learning style & communication preferences

How do you learn best?

Show me ☐ Tell me ☐ Let me try ☐ Mix of all ☐

Preferred feedback style

In the moment ☐ End of shift ☐ Written ☐ All of the above ☐

How do you handle stress?

What helps you feel supported?

Biggest fear right now:

Biggest strength right now:

Preceptor notes after intake conversation:

Preceptor–orientee learning contract



Complete together on Day 1 or 2. Both parties keep a copy.

Orienteer name:

Preceptor name:

What successful orientation looks like (be specific)

What I (preceptor) commit to:

- ☐ Daily feedback after every shift
- ☐ Honest, specific, timely communication
- ☐ Teaching the why, not just the what
- ☐ Raising concerns early and directly
- ☐ Supporting your growth, not my comfort

What I (orientee) commit to:

- ☐ Asking for help rather than guessing
- ☐ Practicing skills fully, not taking shortcuts
- ☐ Debriefing every challenging situation
- ☐ Receiving feedback openly and applying it
- ☐ Coming prepared and engaged every shift

If either of us has a concern, we agree to:

- ☐ Raise it directly with each other first, within 24 hours
- ☐ Involve our manager if we cannot resolve it together
- ☐ Not let concerns sit unspoken for more than one week

Preceptor signature:

Orienteer signature:

Date: _____

Date: _____



Complete together at end of each week. Both rate independently, then discuss gaps.

Week: _____ Date: _____ Preceptor: _____

Milestone area	Preceptor (1–5)	Orientee (1–5)	Focus for next week
Time management & prioritization			
Clinical assessment accuracy			
Medication safety			
Documentation timeliness			
Communication with care team			
Patient & family communication			
Recognizing & escalating deterioration			
Asking for help appropriately			
Confidence & professional demeanor			
Overall independence readiness			

Three things going well:	Concern(s) to address this week:



Use after significant clinical events or at end of shift. Aim for at least one SIGN conversation per shift.

Date: _____ Situation / event being addressed: _____

S

Specific

What exactly did I observe? (name the behavior, not the person)

I

Impact

Why did this matter? (patient safety, team, quality of care)

G

Grow

What is the gap, if any? (stated without judgment)

N

Next step

One concrete, measurable action for this week

End-of-shift debrief prompts

"Tell me one thing you're proud of today."

"Tell me one thing you'd do differently."

"Here's one specific thing I want to highlight."

"Here's one thing I want you to focus on this week."

Difficult conversation scripts



Pull this page out before any hard conversation. Adapt the language to your relationship — keep the structure.

When your orientee is not progressing

"I want to talk to you honestly because I believe you can get there. I've noticed [specific observation] over the past [timeframe]. I'm concerned because [specific impact]. I want to support you in [area]. Here's what I'd like to see this week: [one concrete goal]. Can we check in on this at the end of every shift?"

When you observe unsafe clinical practice

"I need to stop you right now — not to criticize you, but because I'm seeing something that concerns me about patient safety. [Describe specifically.] Here is why that matters: [explain the risk]. Let's pause and walk through this together."

When recommending an extension of orientation

"I've been watching your progress carefully and I want to be honest. I don't think you're ready to practice independently yet — and I say that because I care about your success and your patients' safety. Specifically, I'm still concerned about [two or three areas]. I want to recommend extending orientation. Let's talk to [manager] together."

When your orientee is struggling emotionally

"I've noticed you seem [tired/overwhelmed/withdrawn] lately, and I want to check in. This job is hard, especially in the first year. I'm not asking you to tell me everything, but I want you to know that support exists [EAP/manager]. Is there anything I can do to make orientation more manageable right now?"

When your orientee pushes back on feedback

"I hear that you see it differently and I want to understand your perspective. Can you walk me through your reasoning? [Listen.] I appreciate that. Here's where I'm coming from: [restate your concern anchored to patient safety]. I'm asking you to be open to examining this decision together."

Clinical competency sign-off log



Orientee: _____ Unit: _____ Preceptor: _____

Confidence rating: 1 = needs full guidance 2 = needs prompting 3 = needs check-ins 4 = independent 5 = could teach this

Skill / competency	Attempt 1	Attempt 2	Attempt 3	Sign-off date	Preceptor notes
IV insertion & management					
Foley catheter insertion					
NG tube insertion					
Blood transfusion administration					
Central line dressing change					
Wound care / VAC dressing					
Tracheostomy care & suctioning					
Chest tube management					
SBAR handoff communication					
Rapid response recognition & activation					
12-lead ECG acquisition					
Code blue participation					
Patient & family discharge teaching					
Documentation in real time					
Medication reconciliation					
Custom: _____					
Custom: _____					



Complete weekly during any orientation period. Be honest — this page is for you.

Rate how you're doing this week	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
I am giving feedback without frustration or resentment	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
My clinical practice is not being compromised by precepting	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
I am leaving work at work and not ruminating at home	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
I have said something genuinely encouraging to my orientee	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
I feel invested in my orientee's success right now	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
I am taking care of my own health and wellbeing outside work	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
I feel supported by my manager and colleagues	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5

Early warning signs — check any that apply this week

- ☐ ☐ I am resenting my orientee's questions or pace
- ☐ ☐ I am doing tasks myself to avoid the slower pace of teaching
- ☐ ☐ I am dreading shifts with my orientee
- ☐ ☐ I feel responsible for every mistake they make
- ☐ ☐ I am emotionally exhausted beyond normal fatigue
- ☐ ☐ I am feeling cynical about new grads or new nurses in general

If you checked two or more of the above, consider:

- Talking to your manager about your current preceptor workload
- Requesting a planned break from precepting after this orientation ends
- Using your EAP — preceptor burnout is a valid reason to access support
- Reaching out to a peer who has precepted and has perspective to offer

One thing I'm proud of this week:

One thing I need more support with: